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TOURISM

CANADA'S TOURISM MONTHLY

January-February 2003

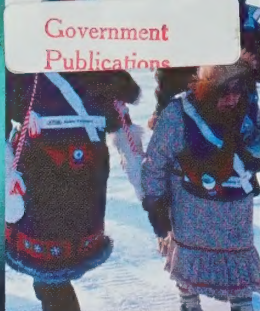
The CTC in 2003 and beyond

An interview with Charles Lapointe

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IN OUR COMING ISSUES

In **March**, we will investigate travelling to, and within, Canada. We will address airline issues, border crossings, and the resurgence of rail travel. We will also examine the health of our country's highway system as a tourism corridor; some think it is marvelous, others feel that our highway infrastructure is in need of serious attention. **At Issue** will examine the air transportation sector.

In **April**, spring is making its presence felt across the country. Spring is thought of as a shoulder season by many tourism operators; some attractions aren't even open. Increasingly, though businesses are finding ways to increase revenues at this time of year. We will also have a feature about our national, provincial and territorial capital cities. **At Issue** takes a look at Canada's highway infrastructure. **Deadline: February 28, 2003**

Month	Deadline: Articles/Advertising	Features
May 2003	March 28, 2003	CHOICES: where to stay in Canada Fishing Canadian waters
June 2003	April 25, 2003	Canadian niche products Product clubs, seven years later
July/August 2003	May 23, 2003	Experience SUMMER in Canada Exploring a new market: youth
September 2003	July 25, 2003	CHOICES: eating well in Canada Canada, a stage for learning
October 2003	August 29, 2003	Experience AUTUMN in Canada Discovering Canada through its museums
November 2003	September 26, 2003	CHOICES: new things to do in Canada Revamping Canada's attractions
December 2003	October 24, 2003	Experience WINTER in Canada Canada, a multicultural society

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On the cover: Northern Lights are one of Canada's stunning attractions.
Photo: Paul Nicklen.
Courtesy: Above & Beyond magazine.

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- CTC Tourism Intelligence Bulletin - Issue 11, January 2003 Executive Summary
- What If There Is a War in Iraq: The Potential Impact on Selected International Travel Markets to Canada

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■ The Canadian Tourism Industry

Vision: Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission: Canada's tourism industry will deliver world-class cultural and leisure experiences year round, while preserving and sharing Canada's clean, safe and natural environments. The industry will be guided by the values of respect, integrity and empathy.

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Editorial

Getting down to business by Peter Kingsmill

Keeping our readers informed about the research, product development, and marketing activities of the Canadian Tourism Commission (CTC) is a very important part of what we do. It is also important that we portray Canada visually as the spectacular, safe and accessible destination that she is.

But that is not all. *TOURISM*, like its forerunner *Communiqué*, is primarily expected to be a "business to business" magazine. Our tourism industry readers expect us to keep them informed about every piece of potentially useful information we can find; and to bring them an understanding of our industry from a number of perspectives. This year we are introducing some new columns, including "At Issue" submitted by Randy Williams of the Tourism Industry Association of Canada (TIAC) and a regular contribution from Marc-André Charlebois of the Association of Canadian Travel Agencies (ACTA).

Our approach to reporting news has changed, reflecting the reality that *TOURISM* is a monthly, not a daily or even weekly magazine. You need to receive industry-related news while it is still, in fact, news, so we are building a much closer relationship with the CTC's Internet business-to-business portal, the Canadian Tourism Exchange (CTX) at www.canadatourism.com. We will be highlighting important material in

the magazine, of course, but continually referring our readers to the Web site for time-sensitive or background material.

Often people write to us and ask, "Can my business or organization become a contributor to *TOURISM*?" Absolutely, yes! Throughout the year, we invite input from our readers on any and all topics of importance to Canada's tourism industry. We especially encourage our readers to study our editorial line up and respond appropriately to the themes and topics that will be up for discussion, with the caveat that stories about destinations and products should be more than promotional: they must have a value-added aspect for our industry readers.

TOURISM belongs to you, our industry partners. We who manage, create, and deliver it to you want to provide you, every month, with the best information we can find. This issue talks at length about CTC programs, as we have done in the past, with the January/February issue. In March, we're back on the road, looking at travelling to and within Canada, and our highways. Travel with us! 🍁

Peter Kingsmill, Editor-in-Chief

CHARLES LAPOINTE TO CHAIR CTC BOARD



Charles Lapointe, president and CEO of Tourisme Montréal, has been appointed chairman of the board of directors of the Canadian Tourism Commission. Lapointe has been with Greater Montréal Convention and Tourism Bureau since 1989 and he has served a number of years on the CTC board as the Quebec private sector representative.

DOUG FYFE RETURNS AS INTERIM CEO



Doug Fyfe was appointed interim president and CEO of the Canadian Tourism Commission on December 18, 2002. Fyfe was most recently president of Tourism Toronto; before that he held a number of positions in the CTC and its predecessor organizations, including the presidency from September 1995 to February 2002.

The Tourism Careers for Youth pilot project, funded by the Canadian Tourism Human Resource Council, Human Resources Development Canada, and Alberta Human Resources and Employment, expects to recruit, train and provide work for more than 8000 young people Canada-wide. www.cthrc.ca

TOURISM RECOVERY MIXED



In the third quarter of 2002, low-cost air carriers again posted profits. Canadian hotel occupancy rates in September were better than last year, and August occupancies indicated that the industry had already rebounded to match last year's pre-September 11th performance. There are a number of gaps in the recovery, however.

WINTER WORKING WELL FOR SKI RESORTS



Intrawest Corporation reports record ski activity at mountain resorts in December. The company's 10 mountain resorts experienced strong occupancy and skier visits during the recent two-week holiday period, up 12 percent over the same period in the 2001-2002 winter season. The Intrawest "resort village" concept appears to be increasingly popular with skiers (www.intrawest.com).

The world tourism picture is "better than expected", according to the World Tourism Organization. 715 million international tourist arrivals were registered last year, 22 million more than in 2001. www.world-tourism.org.

Letters to the Editor

The North ignored?

I read with interest the latest issue of *TOURISM*. I was particularly intrigued by your article entitled "How was your summer?" as it was "an informal survey of hotels, resorts and operators across Canada."

Perhaps it was an oversight but a third of Canada's landmass appears to be missing: the North. I realize we represent a small portion of the tourism dollars in Canada but it is somewhat insulting to be continuously and studiously ignored. 🍁

Dana Britton, Yellowknife, NT

Publisher's Note:

Ms. Britton will be interested to learn that, beginning with this issue, Tom Koebel (publisher of *Above & Beyond, Canada's Arctic Journal*) will be a regular contributor to *TOURISM* magazine, to bring expanded coverage of northern tourism issues. *Above &*

Beyond publishes a visually appealing and informative perspective on northern living every two months. A recognized and popular part of the North for 15 years, *Canada's Arctic Journal*, enjoys an avid readership among residents, government, business and leisure travellers.

An Interview with Charles Lapointe



Charles Lapointe.

Charles Lapointe, president and CEO of Tourisme Montréal, was appointed Chairman of the Board of Directors of the Canadian Tourism Commission (CTC) in December. He spoke to TOURISM magazine from the Ottawa office of the CTC.

TOURISM: The document "Who We Are and What We Do" published by the CTC last February states that one of the Commission's objectives is to "support a cooperative relationship between the private sector and the governments of Canada, the provinces and the territories with respect to Canadian tourism." Indeed, we consistently emphasize this special private sector mandate in our documentation, stating that the CTC is "industry led". Are we there yet?

Lapointe: I believe – and you will hear me saying it more and more – that this principle of "industry-led" is paramount to our success. I would say, though, that we are not there yet because we still have to refine the functioning of our working committees and define more clearly the roles of the committees, the Board, and the staff at the Commission.

My view is that the Board determines the strategic direction and objectives of the CTC. The working committees, where we find most of the participation from private sector partners, decide what are the best marketing activities we have to entertain. They develop the strategy, budget and mix of activities for each program area. They present them to the Board for final approval. They are mainly responsible for providing leadership, operational direction and accountability for program delivery. The staff within the organization is at the service of the Board and of the working committees. They are responsible for carrying out the programs. The role of the staff, through the President,

is to provide the information, analysis and options that enable the Board to fulfill its role effectively and to implement the direction given by the Board. Bear in mind, of course, that the staff at the CTC are a group of experts. They can argue their points of view (from that perspective) but once a decision is taken at the committee level it has to be implemented.

The Board does need to get together with senior management and with the chairs of the working committees to review if we still, after eight years, have the right model. Maybe we will conclude that yes, we are working with the right model and perhaps have to make our working committees more dynamic. We have a retreat to look at these issues in June. I want to make sure that, at every level, this "industry-led" principle is understood and implemented.

TOURISM: At a meeting of tourism ministers in Victoria last autumn, the cooperative relationship between the CTC and the provincial and territorial tourism ministries was certainly front and centre in the discussions. How do you propose to use the CTC's mandate to address the needs of the provincial and territorial tourism departments, while maintaining strong industry leadership?

Lapointe: The CTC cannot ignore – and has no intention of ignoring – the provinces and territories. In fact, provincial and territorial governments have 27 percent of the CTC Board voting power (7 out of 26 seats) and therefore play a major role in the CTC's business decisions. In addition, officials from the provinces and territories have representatives on all CTC working committees. On the other hand, I think everybody will have to understand that the Canadian Tourism Commission is not a (federal) department nor is it part of a department. It is an independent Crown Corporation, that reports to Parliament through the Minister of Industry.

I have heard many provinces say that we should go back to the good old days; the federal government should give them money and they will manage it. But, those so-called good old days, they are over. The

provinces and territories are full-fledged partners, but some of them may have to change their way of thinking. They are not partnering with the Canadian Government; they are partnering with the Canadian tourism industry together with the Canadian Tourism Commission.

Again, as we discussed in the first question, if we are serious about having an industry-led marketing agency, we cannot go back to our old ways of doing business. I want to emphasize, though, that I am not at all discouraged by our relationships with the provinces and territories. Most of them have already taken the step of creating their own marketing agencies, and acknowledge that this trend is how we should all be doing business. We can all reach common ground.

TOURISM: Charles Lapointe has been appointed Chairman of the Canadian Tourism Commission during interesting times! Times such as these open doors as much as they shut them. What new opportunities do you see opening up for Canada as a tourism destination?

Lapointe: Based on my relatively short time in this position, and looking at what we have done in terms of marketing activities, the image we have promoted around the world fits our industry vision statement – the premier four-season destination to connect with nature and to experience diverse cultures and communities. Looking at this, I find it good; our unspoiled spaces and lakes and rivers and so on are what is (top-of-mind) with our potential clients.

But... we also have a responsibility to make the modern Canada known. We need to look more precisely at our cities and at our cultural products. When I say cultural products I am not only thinking of ballet and symphonies and visual arts – I am also thinking of the (modern) entertainment industry.

One of my first objectives in the coming years is to make a better connection between the tourism world and the cultural world. Cultural industries in Canada are major exporters, and sometimes our country is known through its artists, be they in the performing arts or the

visual arts. This will bring us to marketing a more urban product. In the Canada and U.S. market we see a strong trend to "get-away" weekends and short stays. City product becomes very important in that sense. Even the Great Britain and France markets are experiencing this trend; many people travel to New York for a three-day weekend. I think we could convince them to come to Toronto or Montreal. It could be the same thing from Los Angeles to Vancouver.

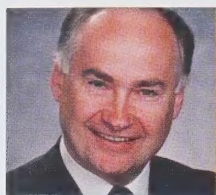
TOURISM: Where would you like to see the CTC going in the next, say, five years?

Lapointe: That's easy to answer. We are a marketing organization, and we have to stay with our three principles, which are "industry-led, research based, and market-driven". I want us to be recognized internationally as the best marketing organization in the world!

TOURISM: We say that the guiding principle of all Commission undertakings is partnership with the private sector and with other public sector players at all government levels. Rightly or wrongly, many of the small and medium sized operators feel they are unable to participate in CTC activities. How do we address the challenge of getting more industry players involved as partners?

Lapointe: Since the beginning of the CTC seven or eight years ago, it has always been a preoccupation for me how to serve the needs of the small and medium size enterprises. The world has changed in the last seven or eight years, and while the major national campaigns will always be too costly for smaller businesses, I think we are now in a position to look at other tools that match their needs and budgets. Access to e-commerce is one such tool. More and more, consumers are using the Internet to book their holidays and travel packages, and that is where I think we will be particularly useful to the "SME" community. We have a SME committee of the Board, and I will be asking the staff to work on this project with the committee.

TOURISM: Thank you for talking with us, M. Lapointe! ❄️



At Issue

by Randy Williams

Maintaining our competitive advantage

Canada enjoys a growing competitive advantage in the area of tourism thanks to a strong and multifaceted tourism and travel industry. It is built on a commitment to excellence, shared by the private and public sectors, that drives constant efforts to enhance Canada's image as a destination and its ability to compete in rapidly expanding world markets.

Tourism thus represents an increasingly important sector of the Canadian economy, providing vital jobs that support hundreds of thousands of individuals and families and are the economic lifeblood of entire communities. It also generates billions of dollars in tax revenues.

We must safeguard and strengthen our tourism advantage in the face of a range of challenges, both internal and external. The benefits tourism brings to Canada depend, domestically, on the existence of a public policy environment that creates a climate of economic growth, as well as on specific instances of policy that impact the tourism industry directly. Those challenges can only be addressed in the light of constructive debate among Canadian tourism businesses and the associations that represent them, government and the travelling public. I am pleased the Canadian Tourism Commission publication *TOURISM* has provided a forum in which the Tourism Industry Association of Canada (TIAC) can raise timely issues on behalf of our industry and, hopefully, generate further productive discussion.

One such issue involves the fees, taxes and surcharges—among them the \$24 Air Travellers Security Charge (ATSC)—that inflate the cost of airfares in Canada, in some cases doubling the cost of short-haul flights. Pricing has a major impact on people's willingness to travel, and these add-ons have made many Canadians think twice about flying. They are reducing the competitiveness of Canadian air carriers and threatening their viability, forcing cuts in air service to some communities, and hurting many businesses that depend on people's readiness to travel.

The air security tax was introduced as part of the federal government's plan to enhance security in Canada as a result of 9/11. The overall plan enjoys widespread support among our industry. Indeed, who can argue against ensuring Canada remains a safe destination? Most of the plan's components are being funded from general government revenues—as indeed they should be, since security is a public good that benefits all Canadians, including those who stay home. The only exception is air safety: with the Air Travellers Security Charge, the entire cost of this government security program is being borne exclusively by air travellers. Taxing a single user group in this manner constitutes poor public policy.

Along with other concerned groups, we have repeatedly called on the federal government to eliminate the ATSC or, failing that, to reduce it to levels in line with air security charges in the United States, which are as low as \$7.65 CDN. The House of Commons Standing Committee on Transport recently urged Ottawa to "implement an immediate and substantial reduction" of the tax, so we are confident there will be some positive movement in the upcoming federal budget. 🍁

*Randy Williams is president and CEO of TIAC.
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What is the ATSC?

When the federal government introduced the Air Travellers Security Charge (ATSC) it took the policy position that users should pay the full cost of security and that the travelling public would be willing to pay the price for added security.

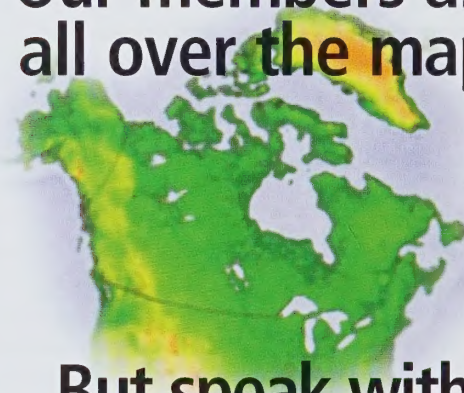
All proceeds from the ATSC will be used to fund the government's 5-year \$2.2 billion package of air security measures including the recently established Canadian Air Transport Security Authority (CATSA) which has full responsibility for all screening equipment at airports, including explosive detection devices and for contracting with the RCMP for armed officers on board aircraft. Other security measures include enhanced security zones at aircraft-handling facilities and on tarmacs.

The government is currently reviewing the ATSC charge and is committed to a transparent review process involving third-party scrutiny, as well as consultation with the air travel industry and other interested parties. Recent comments from the Minister of Finance indicate that the present ATSC rate may be addressed in the February 2003 Budget.

The ATSC is just one of many special charges and taxes that are contributing to the reduction in travel demand. Other surcharges can include aviation fuel taxes, rising airport improvement fees, federal airport rents, NAV Canada charges, travel agent fees, and even GST/HST on some fees and surcharges. 🍁

For more information: phillips.christopher@ctc-cct.ca

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Visit online for more information at www.tiac-aitc.ca



Tourism Industry Association of Canada
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Rising costs, reduced availability

TOURISM magazine has featured a number of industry issues in 2002 that will carry over into 2003 and beyond. Many of these continue to have a profound impact on developing and marketing quality tourism experiences for domestic and international consumption.

Perhaps the single largest issue in 2003 for many small and medium size tourism enterprises in Canada is the cost and availability of general and liability insurance. The impact of 9/11 continues to reverberate in all business circles. Since the events of that date, many insurance companies are either stepping back from their high-risk portfolios or compensating with substantial rate increases.

Just how costly (and perhaps even unaffordable) liability insurance may become is not completely known at this time. Operators across Canada are reporting significant rate hikes but the total impact is not clear at the moment. More ominously, particularly for the adventure industry in

Canada, is the question of whether or not there is growing reluctance on behalf of insurance companies to continue to insure perceived risk sectors. This issue needs to be monitored as 2003 progresses.

The Canadian Tourism Commission (CTC), in recognition of the significant impact of the liability insurance issue on the tourism industry, has commissioned two distinct reports on the issue. A national database of liability insurance providers will be available to the outdoor tourism sector shortly. It will be complemented by a series of insurance tutorials designed to assist operators in choosing an insurance company, negotiating adequate insurance coverage and maintaining a good relationship with the insurance provider. Some information on group insurance purchasing programs will also be made available to operators.

The CTC has also developed a *Risk Management and Insurance Guide*, which will be available

early 2003. The *Risk Management and Insurance Guide for Tourism Operators* contains industry-specific risk management tools that can be practically applied by businesses in all tourism sectors. The guide also provides risk management best practices for the tourism industry that the CTC expects will enhance the capability of tourism operators to manage and insure their prominent business risks. 🍁

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Clarification

On page 11 of the December edition, we noted that the Canadian Tourism Commission became a Crown Corporation in January, 2000. In fact, the Act that created the CTC as a Crown Corporation received royal assent from the Governor General in October, 2000 and came into effect by order in council on January 2, 2001. 🍁

The lights, and the legend



any tourists are drawn each year to Canada's north for an opportunity to view the Aurora Borealis. As surely as these lights in the sky inspire awe in the viewers of today, they have inspired legends as old as time.

They illuminated the imagination and wonder of Chinese astrologers, Sami reindeer herders, Viking navigators, Greek and Roman philosophers, and North American native peoples including the Inuit of the entire circumpolar world. Northern lights are as entwined with northern folklore as day is with night. In the land where one lived at the very edge of life, this ghostly phenomena was called Aksarnek or Aksaneq, which refers to the Sky Dwellers playing a celestial game of kick ball with the skull of a walrus. Some believed that it was the other way around, the walrus and other slain creatures are playing with the skull of a human.

The common thread that runs through practically all arctic legends of Aksarnek is the belief in spirits. Those mysterious luminous vapours could be the souls of animals or humans. They could be messages from the dead or spirit messengers of departed relatives seeking solace in their living kin. It was believed that every strand of light was a human soul and thus one beheld the eerie parade of Sky Dwellers.

Taken from *Above & Beyond, Canada's Arctic Journal* by N.E. Hallendy. Norm Hallendy is a frequent contributor to *Above & Beyond Magazine* (published by First Air) and has been awarded the Royal Canadian Geographic Society Gold Medal in recognition of outstanding work in the field of ethno-geography. Since 1958, he has documented how the Inuit of southwest Baffin, who once lived totally off the land, perceived the landscape around them in both the physical and spiritual sense.

Product development at the CTC

The Canadian Tourism Commission's (CTC) Product Development Division rings in the New Year with a new committee chair (Don Monsour) and a slate of new and ongoing projects and initiatives. The CTC's objectives with respect to product development are as follows:

- to improve the quality and international competitiveness of Canada's tourism experiences.
- to facilitate information sharing and cooperative working relationships among individual operators and other potential tourism industry partners.
- to foster the pooling of resources through various forms of partnerships in order to create critical mass and market impact.
- to ensure that all product development initiatives be research-based and market-driven.

The Product Development Division has several portfolios it actively administers:

Product Clubs

The most visible of the CTC's product development initiatives has been the Product Club program. Product Clubs are consortia comprised primarily of small businesses, which have been formed to develop new packaged experiences, and/or to upgrade the quality of existing experiences offered, by sharing information and working collectively. To ensure that the program meets industry expectations, the CTC plans to develop a performance measurement tool for the Product Club program.

Clubs may consist of operators in the same line of business or they may be in complementary businesses clustered in the same geographic area. In total, there are now 43 Product Clubs consisting of more than 5,500 individual businesses across Canada.

The 2003 call for new Product Club proposals is currently underway with a February 2003 application deadline. By April 1, a host of applications from new potential Clubs will be reviewed and those chosen to become new Product Clubs will be announced once contracts are in place.

For more information:
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Outdoor Tourism

Research confirms that Canada's great outdoors stands out as our most appealing tourism feature to prospective international visitors, as well as to Canadians. Today's tourists want to experience nature first-hand and, in all cases, experiences are heightened by a variety of tourism businesses that provide interpretive programs, guiding services, equipment rentals, accommodations, etc. Our objective, in the context of product development, is to enhance the outdoor operators' effectiveness in developing and sustaining their businesses.

A number of carry-over projects from 2002 and a host of new 2003 initiatives are planned for this year, ranging from an updated national database of outdoor tourism operators to customized TAMS research on outdoor adventure enthusiasts in Canada and the U.S.

For more information:
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Cultural Tourism

On a worldwide basis, there is growing interest in the historical sites and cultural traditions to be found in each country and region. Cultural attractions form part of most tourism itineraries, and in many cases they are the primary reason for the trip. From a product development perspective, the CTC's challenge is to create effective links between the mainstream tourism industry and Canada's cultural institutions and other providers of cultural experiences. On one hand, tourism operators have not traditionally recognized the market potential of Canada's cultural attractions; on the other, cultural institutions have often not seen themselves as part of the tourism industry. Both groups will benefit from developing opportunities and partnerships.

Ongoing product development activities in this sector range from collaborating with the Federal-Provincial-Territorial Cultural Taskforce on Cultural Tourism, to pilot-testing an advanced market-readiness workshop on cultural tourism and the development of market-readiness information tools.

For more information:
labreque.ernest@ctc-cct.ca



Photo: © Louis Ducharme 2002. Courtesy: Ice Hotel Canada.

Seasonality is a major factor affecting the profitability of Canada's tourism industry.

Cuisine Tourism

The cuisine tourism portfolio continues to attract strong interest in partnership participation. While we do have a number of distinctive regional cuisines, many of the foods and cooking styles found in Canada have been adopted from other cultures. That is why "Cuisine in Canada" refers not only to foods that may be considered uniquely Canadian, but also to the tremendous variety of cooking styles that result from our multicultural traditions. Cuisine is a significant aspect of the tourist experience, and an area that has great potential to enhance Canada's tourist appeal.

This year, the CTC will introduce a new Cuisine Tourism subcommittee; planned initiatives for 2003 include the promotion of the cuisine strategy "Acquiring a Taste for Culinary Tourism" and market-readiness and training and education workshops.

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Aboriginal Tourism

Experiencing and learning about Canada's Aboriginal cultures is another important aspect of our tourism offering, and there is significant potential for economic benefit to Aboriginal communities. Increasing the level of market-readiness and ensuring consistent service delivery are priorities for Aboriginal tourism product development. The CTC will work closely with Aboriginal Tourism Team Canada [ATTC] and its other partners as the organization rolls out its *National Study of*

Aboriginal Tourism in Canada and embarks on an extensive strategic planning process in 2003.

For more information:
verschuren.frank@ctc-cct.ca

Winter Tourism

Seasonality is a major factor affecting the profitability of Canada's tourism industry and, indeed, the goal of positioning Canada as a four-season destination appears prominently in the industry's vision statement. Nearly 70 percent of Canada's international visitors currently arrive during the second and third quarters of the year (April 1 - September 30). While there is an opportunity to extend the early spring and fall "shoulder seasons" for some operators, the primary need is to develop more tourism activity during winter. Our objectives are to capture and highlight the inventory of Canada's winter tourism experiences and to encourage the packaging of these experiences so that they can more easily be sold to consumers.

The Winter Tourism subcommittee has a number of initiatives planned for 2003 including Winter Lights Celebrations in partnership with Communities in Bloom, and research on winter tourism activities currently available in Canada to identify winter tourism trends associated with demographics, market shifts, emerging markets and future demand. ❄️

For more information:
deneault.mylene@ctc-cct.ca



Storefront

Insights on travel agencies by Marc-André Charlebois

It is a pleasure – and an honour – to bring important issues from the Association of Canadian Travel Agencies (ACTA) to the pages of *TOURISM*. The retail travel industry and the tourism industry share so many issues, it simply makes sense to be working together towards some common goals. We are at a juncture where it makes more sense than ever for Canadians to spend their holidays or stage business events in Canada. In these times of uncertainty, travel agencies have everything to gain from adding well-packaged and affordable Canadian destinations to their offerings. At ACTA, we are seizing the opportunity to make it easier for our members to reinvent themselves into suppliers of Canadian experiences.

In the coming months, I will share with you what retail travel professionals are doing to reinvigorate their businesses. In that vein, I think that the most important recent development has to do with a major initiative undertaken by ACTA and key stakeholders to launch a Canadian Travel Exchange. You may have already heard about this exciting initiative, but I would like to take this opportunity to describe it briefly.

On October 8, 2002, coinciding with our ACTA Board meeting in Calgary, Industry Canada released a report on the future of our industry. Martin Taller, recently appointed ACTA's Chief Policy Officer, carried out the research and authored the study. I urge you to download it from the Industry Canada Web site (www.strategis.ic.gc.ca); it makes for a good read. One of the report's recommendations involved the creation of an Internet-based marketplace where agents could package, list and sell Canadian experiences and destinations.

ACTA picked up on this idea and is working with a highly competent, driven group of people determined to bring about the creation of such

an Exchange. CanTX, now a registered federal corporation, will be a business-to-business, wholesale e-marketplace for Canadian travel agents, domestic tour operators, vacation packagers and Canadian travel & tourism product suppliers. It will distribute Canadian vacation packages and travel products to domestic and international travel agents for retail sale to their customers. In addition to the online distribution of unique Canadian travel products to the travel trade, CanTX will provide "listing" agents with the ability to inventory and distribute aggregated Canadian travel and tourism products to "selling" agents, who either sell these packages or combine them dynamically with other travel products to fit the individual requirements of their clients on a just-in-time basis. CanTX will maintain all transactional data and provide for the settlement of funds among product suppliers, agents and all other parties involved in the sale of travel products and services through the Exchange.

Our partners include the IATA Travel Settlement Plan, the Canadian Commercial Corporation and Travelinx, a well-established applications services provider and IT consultancy based in Toronto. The Canadian Tourism Commission has expressed a willingness to provide marketing support to CanTX once it is up and running.

More than ever, tourism and retail travel professionals will be working together to the benefit of consumers and the Canadian economy. 🍁

*Marc-André Charlebois is president and CEO of ACTA.
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Risk management: marine insurance

Transport Canada's new *Marine Liability Act (MLA)* came into force in August, 2001. The *MLA* deals with the liability of marine operators in relation to passengers, cargo, pollution and property damage, and the intent of the Act is to provide a uniform method for establishing liability that balances the interests of ship owners and passengers, and provides limits of liability. The Act establishes maximum liability for operators of \$350,000 per passenger, while at the same time prohibiting the use of liability waivers. The *MLA* also provides for the introduction of compulsory insurance requirements for marine operators.

Many operators in the outdoor tourism sectors affected by the Act remain opposed to it. Limits of liability, the interpretation of the Act in the context of when it applies or doesn't, and the

insurance industry's interpretation of the Act and what this will mean for accessible and affordable insurance into the foreseeable future continues to weigh heavily on the minds of the outdoor tourism sector.

In January 2002, Transport Canada engaged The Mariport Group Ltd. to consult stakeholders, make recommendations, and determine the impacts of a new regulatory regime of insurance for vessels, as well as which special considerations to be given to the outdoor tourism sector if any, and the opportunity to once again be consulted. Mariport recently submitted its report to Transport Canada and it is available in both official languages from Transport Canada at (613) 993-5051 🍁

*For information:
verschuren.frank@ctc-cct.ca or
farmilo.irenka@ctc-cct.ca.*

Trans Canada Trail

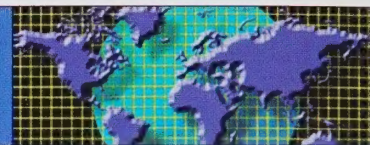
On February 19, 2000, the Trans Canada Trail (TCT) Relay officially got underway, when Junior Rangers drew water from the Arctic Ocean through a hole in the ice at Tuktoyaktuk in the Northwest Territories. Relay teams from our three oceans began carrying bottles of the water towards their final destination in Canada's National Capital Region (Ottawa).

Through the year, and with the cooperation of the TCT Foundation, *TOURISM* will take you on a 16,000-kilometer journey in pictures. 🍁

Yukon Territory	Northwest Territories	Nunavut
Population: 31,000	Population: 41,600	Population: 27,000
Area: 483,450 km ²	Area: 1,172,918 km ²	Area: 1,994,000 km ²
TCT: 1,600 km	TCT: 5,000 km	TCT: 600 km

Photo: Dominic Stubbs, courtesy of Trans Canada Trail Foundation.





Leveraging the Canada brand in a competitive marketplace

Non-traditional partnerships sell Canadian tourism and travel products.

Admittedly, the competition is tough. Markets are fragmented, segmented, saturated. Consumers are fatigued, confused, unimpressed. These days the competition for consumer attention is tougher than ever, so, in the business of selling Canada to the world, it pays to be unorthodox.

For the Canadian Tourism Commission (CTC), taking the non-traditional approach involves buying into the innovative marketing efforts of a growing family of private sector partners, among them internationally renowned names such as American Express, Michelin and Rover.

The formula is compelling: partner companies increase awareness, attract new customers and build market share by leveraging CTC programs and the Canada brand, while the CTC gets access to distribution channels and targeted consumer segments unreachable through mainstream CTC marketing programs.

Patrick Gedge, Senior VP, Marketing & Sales explains the rationale:

"To compete and position Canada in the global tourism market with our limited resources, the CTC is establishing business relationships with non-tourism businesses that have an affinity with tourism. Industry leaders such as Rover, Samsonite, Canada Dry and Michelin are joining forces with the CTC to grow their businesses, while contributing in turn to the growth of tourism in Canada. These partnerships offer the CTC new opportunities to reinforce the value of travel in Canada, and they provide access to targeted consumer segments and distribution channels to deliver cost-effective messages through advertising, direct mail, Internet marketing and other programs."

Simply put, the non-traditional approach is designed to create innovative marketing programs that build and sustain an elevated Canada presence in the marketplace. Six examples tell the tale.

Take Canada for a test drive



When auto manufacturer Rover set out to promote its latest model in Italy, the CTC decided to go along for the ride. To inspire high-income earners to experience the luxury of the sleek new Rover 75, the company has mounted a campaign featuring draw-prize trips that will bring five couples to Canada with stops in Montréal, Quebec City, Montebello and St. Alexis-des-Monts.

Using images of the Rover 75 against stunning Canadian backdrops, the contest invites Italians to test drive the new car. Worth \$500,000, the campaign was launched with direct mail packages going to 150,000 high-earning households. The mailing includes a stand-alone postcard that enables people to both enter the contest and request further information about Canada as a travel destination. Backed by a concurrent poster blitz, the campaign gives Canada valuable brand exposure and adds qualified leads to the CTC database.



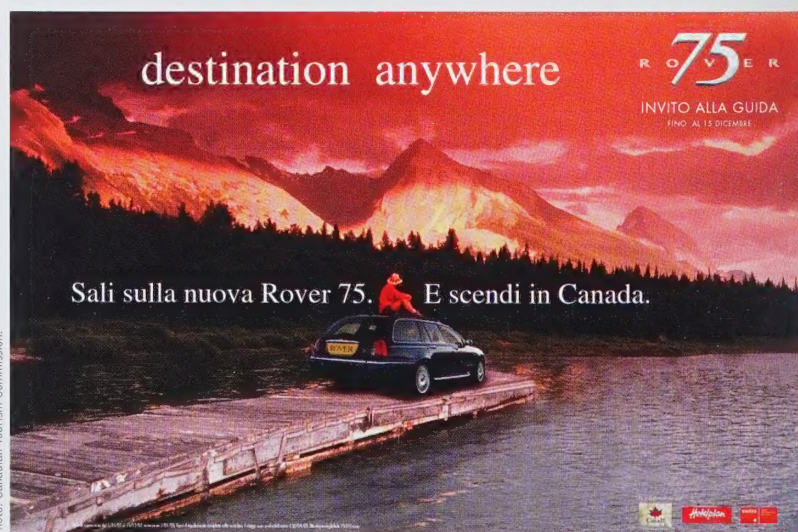
From down under to up over



When Australians prepare for adventure, they head to Paddy Pallin, a chain of retail stores selling gear and clothing for the outdoor adventure enthusiast. Prompted by the CTC, the retailer recently embarked on a campaign to increase sales using trips to Canada's Yukon as the main draw.

The campaign was built around a Win a Trip to the Yukon contest that required entrants to have made minimum \$50 purchases at any Paddy Pallin store. In-store contest promotions included window displays, staff badges and point-of-purchase materials. The chain expected a high return on the effort, so invested in a national advertising campaign to drive traffic to the stores.

For Yukon, the contest promoted adventure travel to a targeted market, capturing names and addresses for subsequent fulfillment mailings. It worked; there were a total of 5000 entries into the competition, with 1200 requesting further information on the Yukon and Canada.



The French connection



The CTC office in France cut deals last year with a dozen different partners, gaining valuable access to more than five million households that fit the profile for the international travelling public. One of these deals was in the banking sector with a new partner for Canada - Crédit Mutuel de Bretagne.

More than 350,000 families who carry the bank's Préférence CMB card received a special invitation last year to visit Québec on a new flight direct from Nantes in Bretagne (Brittany) to Montréal. Interest was piqued by a contest in which two people won a travel package to Canada. Vacances Air Transat, the Canadian tourism industry partner in the venture, reported sales of 200 vacation packages directly attributable to the novel promotion.

Whales make a splash



Word of the CTC's non-traditional approach to marketing is getting around. When the Whale and Dolphin Conservation Society (WDCS) heard about CTC's success, they approached the CTC office in Germany with an idea for an image promotion. Within weeks, a plan was in place to forge a partnership among the Commission, a German tour operator, WDCS, Destination Québec and a major tour operator - CANUSA.

The ensuing campaign took many forms, from a major media promotion to a contest in Germany that invited children to draw pictures of whales. Some 1200 youngsters took part in the contest with the top three paintings earning free trips for the young artists.



The campaign generated almost \$1,250,000 in advertising value, and reached more than 34 million consumers, achieving 680 countable requests and resulting in sales of \$1,372,765. There were winners all round; contestants enjoyed the trip of a lifetime, the Whale and Dolphin Conservation Society sent its message of protection and conservation to a whole new audience, and Canada's tourism industry made a new splash! This marketing initiative is now in its second year. New partnerships were created with Tourism Vancouver Island and other Canadian operators.

Where the rubber hits the road



In the spring of this year, the CTC will partner with Michelin in a major campaign worth more than \$1 million. Called *Experience the True Nature of Canada*, the campaign aims to promote tourism and travel in Canada with a contest that offers more than \$250,000 in travel prizes.

With point-of-sale materials in 2000 dealerships and 400 Petro-Canada locations across Canada, a national radio buy, exposure on 350,000 Petro-Canada credit card statement stuffers, Web site promotion, e-mails, and a full page ad in the CTC spring newspaper insert, the *Experience the True Nature of Canada* partnership will enhance the Canada brand right across the country, delivering messages of the almost infinite variety of travel possibilities to those who are ready to hit the road.

Look up, way up



There's nowhere better than Canada to see the Northern Lights, and the unparalleled beauty of this natural phenomenon in winter has significantly raised Canada's profile as a four-season destination. In a partnership between American Express Bank in Taiwan and the Canadian Tourism Commission, the CTC has been able to promote its latest winter product - Aurora Borealis - while encouraging Asian awareness of Canada as an exciting travel destination.



The partnership developed a consumer promotion for the American Express Bank in Taiwan that distributed 2,900 banners, 50,000 brochures, 60,000 flyers and 80,000 lucky-draw coupons. Backed by a 10-second television commercial and an Internet news release, the campaign increased traffic to the bank's 2,800 branches and gave Taiwanese travellers the opportunity to imagine travelling to Canada to witness one of nature's breathtaking performances.

For a CTC investment of only \$55,000, the campaign earned Canada more than \$500,000 worth of exposure, attracting 15,000 contest entries, achieving an impressive 18 percent response rate and, as tour operators report, generating solid new business for group and FIT package tours featuring Aurora viewing.

The results achieved through non-traditional partnerships and campaigns are ample evidence of their practical benefit. As Patrick Gedge puts it, "Leveraging the Canada brand, extending the reach of the tourism and travel industry, entering and securing lucrative new markets, non-traditional alliances and initiatives have become an integral component of the Canadian Tourism Commission's strategy. And we're only just beginning." 🍁

For more information on CTC's non-traditional marketing programs and initiatives, and CTC contacts in-market: gauthier.pierre@ctc-cct.ca



Discover our true nature
www.travelcanada.ca

On becoming a great marketer



Patrick Gedge.

TOURISM talked with senior vice-president Patrick Gedge, the Canadian Tourism Commission's head of marketing, in January. He had a lot to say about focus, and astute marketing, as the Commission's marketing committees and the Ottawa and in-market staff have been adjusting to the realities of selling tourism in the new millennium.

TOURISM: *How are we adjusting to the new customer, and the new economy, since 2001?*

Gedge: For starters, we can't assume that anything is going to work the way that it used to work. We have to continually keep our eyes focused on what is happening with our consumers in each and all of our markets. It is very plain that our competitors continue to ramp up their marketing efforts in our primary markets – and they are getting smarter with their marketing as well.

With the level of funds that we have, which from a global perspective are extremely limited, we can no longer afford to do what we call

“traditional” marketing. To simply put together an advertising campaign and buy a whole bunch of advertising is, first of all, not affordable. It is also not highly targeted enough to reach those customers we are seeking with the money to spend that we want to attract to Canada.

TOURISM: *Are you saying, then, that good marketing these days requires a highly focused approach?*

Gedge: The difference between a good marketer and a great marketer is the ability to identify opportunities ahead of competitors, and take the risk to market aggressively. My belief is that the working committees and the

marketing staff at the CTC recognize that we have to have a process of continuous checking and continuous innovation. Wherever we see opportunity, we must pounce on it! For example, over the next few months you will start to see more of the non-traditional activities that have been generated, and more sharing of knowledge and best practices that can be successfully applied across markets.

All of these things are part of the collective awareness that we cannot “buy” markets with the money we have. I really believe we are creating a strong marketing culture and moving from being good marketers to being great marketers. 🍁

Marketing Canada

The Canadian Tourism Commission's (CTC) marketing programs will concentrate on gaining market share by continuing to raise awareness of Canada as a travel destination, developing motivational appeal to potential visitors, building traditional and non-traditional (outside of the tourism sector) partnerships, facilitating sales and tracking and evaluating results.

Sales efforts will concentrate on educating the travel trade, positioning product in-market with tour operators, travel agents, meeting planners, creating venues to showcase Canada product, and supporting overall efforts of raising awareness and attracting attention to Canada through special events.

Special in 2003

- all marketing areas will try to capitalize on redirecting potential travel from “deemed” unsafe areas of the world to Canada.
- special emphasis will be placed on unpaid media and public relations as well as special events. The intention here is to attract attention to Canada that we would not otherwise get.
- special focus will be placed on experiential/niche marketing such as spas, gardens, golf and ski.
- Recognizing the continued importance of electronic marketing, all areas will increase the use of the Internet for the distribution of information to industry and to the travelling public.

Full details can be found in the 2003 Strategic Plan for each market, available at www.canadatourism.com or from the market's program director, as supplied with the accompanying Strategic Plan Overviews. 🍁

Marketplace: U.S. Leisure

U.S. market research and monitoring will serve as the foundation to all marketing programs and decisions.

- Unique events and experiences will be promoted with participation from the tourism industry to generate print and broadcast coverage and develop relationships with complementary sector partners.
- Major efforts will be allocated to integrated on-line activities to create top-of-mind awareness of Canada, position Canadian products in key virtual environments, and push products directly to consumers.
- A mix of consumer marketing will be used to allow broad reach and targeted frequency activities against national and primary markets of New York, Boston, Philadelphia, Chicago, Orange County, San Francisco and Washington D.C.

- Secondary initiatives and ongoing developmental marketing work will be conducted in emerging markets and high potential DMA's highlighted by research and/or partners.
- Joint-marketing campaign opportunities will be sought from Canadian and U.S. partners to position new products and packages and to develop new markets (psychographic or regional).
- Integrated marketing and sales activities will focus on positioning the Canada brand and industry products throughout the distribution and retail networks in the U.S.

The strategic plan in its entirety is available at www.canadatourism.com. For more information contact Mark Schwilden, Director, Marketing, U.S. at 613-952-8405 schwilden.mark@ctc-cct.ca 🍁

Meetings, Conventions and Incentive Travel (MC & IT)

In 2000, Americans made 2.36 million business trips of one or more nights to Canada, which is an increase of 0.4 percent over 1999. They spent \$1.78 billion, a rise of 3.8 percent over the previous year. Also in 2000, overseas visitors made 782,700 business trips of one or more nights to Canada.

The MC & IT Program targets meetings and incentive travel

decision makers with an integrated approach that has two main strategies: relationship building and advertising.

Existing relationships will be strengthened and new ones developed through direct mail, business development, familiarization tours and site inspections, trade shows and special events, and through leveraged activities

linked to the U.S. Leisure Marketing program. Canada's low top-of-mind awareness among American meeting planners will be addressed through direct-response advertising in key U.S. business travel publications and web sites.

The CTC's MC & IT Program has been designed by an industry-led marketing committee with the

primary objective of providing partnership opportunities for Canadian industry, small and large.

Detailed information on partnership opportunities is available at www.canadatourism.com.

For more information contact Donna Owens, Director, Marketing MC & IT at 613-946-2140. owens.donna@ctc-cct.ca 🍁

Star power for meeting planners!

An animated meeting planner in a blue dress is the "star" of an interactive e-mail campaign that hit a 5.5 percent response rate in the U.S. Meetings, Conventions, and Incentive Travel market (MC&IT) this past November. The overwhelming success of the test e-marketing campaign by the Canadian Tourism Commission's (CTC) MC&IT group, in partnership with Hilton Canada and Air Canada will pave the way for a new approach to marketing initiatives in 2003.

While traditional direct mail campaigns capture a 1 – 2 percent response rate, this interactive

animation boasting the benefits of meeting in Canadian destinations, far surpassed typical levels and certainly captured the attention of an audience bombarded with promotional materials. The fresh approach to the market generated over 600 new business leads with complete contact information, while 31 percent of the audience opted to watch the full animated message, contributing to the overall awareness of Canada as a potential meeting destination.

The success of the campaign is attributed to two main elements: the development of the main

character's personality so that the meeting planner audience could easily relate to the messages, and the positioning of the campaign as a useful experience where the benefit of learning about a potential meeting destination exceeded the investment of time by the audience. The campaign was designed by Toronto-based agency Fourth Wall Media. 🍁

To view the site, www.hiltoncanadacontests.com/discovercanada.

For more information: baird.christina@ctc-cct.ca.



Marketplace: Asia/Pacific

Over 1.3 million overnight trips to Canada originated from the Asia/Pacific region in 2001, generating \$1.8 billion receipts, excluding airfares. Revenues from Asia/Pacific represented 13.5 percent of all foreign overnight receipts in Canada in 2001, a decline compared to the 14.4 percent in 2000.

Asia/Pacific markets are broken down into a tier structure. The most important market is Japan. The second-tier markets include Australia, Taiwan, South Korea, Hong Kong and New Zealand, and the third-tier markets include developing markets such as China and Southeast Asia.

Marketing objectives for 2003 are to increase awareness of Canada, maintain Canada's competitive position, and establish Canada as the premier "active nature" destination. Marketing and promotional strategies as well as tactics have been developed and will be carried out through advertising, public and media relation activities, consumer promotions and trade activities, with varying applicability to each geographic market.

The CTC's Asia/Pacific Marketing Program has been designed by an industry-led marketing committee with the primary objective of providing partnership opportunities for Canadian industry, small and large.

Detailed information on partnership opportunities is available at www.canadatourism.com. For more information contact Marie-Paule Dupont at 613-954-3966. dupont.marie-paule@ctc-cct.ca 🍁

Europe and Latin America

The committee has identified our primary (United Kingdom, Germany and France), secondary (Italy and Netherlands) and developing (Switzerland) markets.

In 2000, European tourists made 2,476,100 overnight trips to Canada, an increase of 1.7 percent, that generated receipts (excluding airfares) of \$2.8 billion. Most Europeans see Canada as a summer destination; over two thirds of all overnight visits were made in the second and third quarter (April to September).

Our strongest competitor in Europe is the United States. Australia/ New Zealand, Asia, the Caribbean and South Africa also compete with Canada.

To stop competitive erosion of Canada's market share, our focus will be on awareness-building activities reinforced by retail tactics. Canada will be positioned as an exciting, diverse year-round destination where you will find genuine nature and trendy cosmopolitan cities.

In the secondary and developing markets, the focus is on trade activities. In all markets, year round, there are additional participation opportunities on the consumer, trade, media and public relations campaigns and also for Meetings & Incentive Travel.

Detailed information on partnership opportunities is available at www.canadatourism.com. For more information contact Sylvie Lafleur, Director, Marketing, Europe and Latin America at 613-954-3817. lafleur.sylvie@ctc-cct.ca 🍁

Marketplace: Canada

The Canadian domestic market continues to represent the largest tourism market for Canada, accounting for over 70 percent of tourism revenues and 80 percent of all visits in 2000.

With present travel trends continuing, the domestic market will become an even more important player as Canadians reduce their international travel in favour of travelling at home. In 2003, the Canada Marketing Program will operate under a comprehensive mix of marketing, communication, sales,

trade and product development, and research strategies and tactics. Under the global brand, "Canada: Discover Our True Nature", the Canada Marketing Program encourages increased domestic tourism through the following activities:

- Inserts Program
- Co-op Newspaper
- Database and Direct Marketing
- Canada Vacation Guide
- E-marketing
- Outdoor Experiences Program
- Tourism Marketing Initiatives Program

- Media Relations
- Travel Trade

The CTC's Canada Program has been designed by an industry-led marketing committee with the primary objective of providing partnership opportunities for Canadian industry, small and large.

Detailed information about partnership opportunities is available at www.canadatourism.com. For more information contact Scott Patterson, Director, Marketing Canada, at 613-941-0520. patterson.scott@ctc-cct.ca 🍁

Untangle the Web

by Greg Klassen



My most recent column "Market that Web site" created a number of questions on the mysteries of search engine optimization. The following question is often heard:

How useful are the services that offer to raise my Web site's profile in search engines?

This is a difficult question to answer without first having an understanding of the extent of your search engine strategy. As I have said before, search engine optimization is a very complex process. Many of these services will charge you to submit your Web site to search engines and directories where these services are normally available for free.

With a little planning and understanding of the search engine process required for each search site, you could probably achieve these goals on your own. But... you have to do your homework! Take a look at www.searchenginewatch.com to get a clearer understanding of the search engine submission process. Go to your customer's preferred search engines to find out what their listing criteria are.

On the other hand, sometimes it's simply easier to let an organization with expertise in search engine optimization do it for you. Don't forget that submitting to free search engines are only a part of the e-marketing puzzle. Building your site with the correct meta tags, keywords, purchasing search positioning, and linking with partner organizations, will all help improve your site's search profile. 🍁

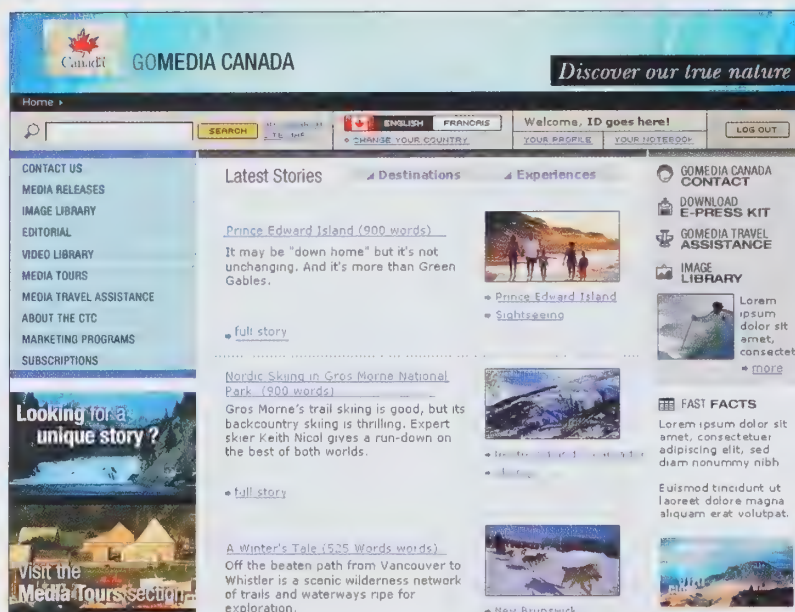
We welcome our readers' questions on managing their tourism Web sites. Please e-mail them to tourism@ctc-cct.ca

New online travel media tool

On January 28, 2003, the Canadian Tourism Commission (CTC) launched GoMediaCanada.com, a Web site designed exclusively for the travel media, where journalists can find essential resources to aid research, accent story ideas, and save production and editing time for travel assignments.

Creating intimate and compelling material should now be easier. GoMediaCanada.com is rich with breathtaking images, unique first-hand experiences and enchanting stories. Journalists can take advantage of an extensive bank of work featuring some of the country's finest travel writers and photographers. The pieces are created from a Canadian perspective, but avoid being advertorial in nature.

The Web site is intuitive, instantaneous and user-friendly, allowing journalists to store information and bookmark references for



future use. Once a story is filed, users can ship the designed page, transcript or photo electronically in universally accepted formats such as PDF or HTML. 🍁

For more information, or to contribute ideas about how to enhance the GoMediaCanada.com experience, contact gomediacanada@ctc-cct.ca.

CTC chooses new ad agency

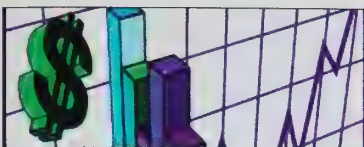
The Canadian Tourism Commission (CTC) has chosen Canadian communications agency Palmer Jarvis DDB (PJ DDB) to support its worldwide marketing programs. The agency was retained by the CTC at the end of November after a competitive review, and is now in the process of making the necessary transition of business from previous agencies.

"I can't think of a better way to serve our country," says Frank

Palmer, CEO and Chairman of PJ DDB. "Using our own integrated services and creative resources, as well as drawing on the power and scope of DDB Worldwide, we're looking forward to creating the best ever advertising to promote Canada both here and abroad."

PJ DDB's Toronto office will anchor the CTC business, drawing on the resources of its Vancouver operation, its Quebec-based partner Diesel Marketing,

and the DDB Worldwide network. Named Agency of the Year in 1999, 2000, and 2001 by *Strategy*, as well as by the *National Post* in 2000, PJ DDB is recognized for breakthrough, award-winning work that generates significant results for clients. In 2002, PJ DDB was again ranked as Canada's #1 agency in *Marketing Magazine's* Scouting Report, based on client feedback and a review of its business and creative portfolio. 🍁



The Research Viewpoint

Non-traditional partnerships – the facts and figures by Scott Meis

At the CTC we've been taking steps to expand the scope of our activities to businesses not traditionally associated with tourism. It may help to know how this new business development initiative came about; it got its start back in the early 1990s when we built a strong foundation with research.

In 1994 the Tourism Satellite Account (TSA) was released. It was a monumental study for tourism research in Canada, and coincided with a growing realization that tourism contributed a large amount to the country's economy. One result of the 1994 study was the realization that almost one quarter – 24.9 percent – of tourism's incremental contribution to the Canadian economy came from industries that are normally considered outside the Canadian tourism sector.

Now the numbers speak for themselves. In 2001, 19.6 million international visitors visited Canada, which made this country the ninth most popular tourism destination in the world. Also in 2001, tourism generated \$54.6 billion, and accounted for 2.3 percent of the country's overall Gross Domestic Product (GDP). We call the tourism component of the economy Tourism GDP, which provides an estimate of overall incremental tourism activity. Tourism GDP for 2001 was \$22 billion.

This is more than a pocketful of change. When we realized that one quarter of that, approximately \$5.5 billion, is money that is being spent outside the traditional set of tourism industries of transportation, accommodation, food and beverages, recreation and entertainment, and travel services, we knew it was time to sit up and take notice. There are other sectors of the

economy which are impacted by the tourism phenomenon, either directly (when, for example, visitors stop at malls or roadside stands to sample local products) or indirectly (such as increased tourism triggering construction activity when new hotels are built).

These ripple effects in the economy are what we are targeting with our new business initiative. We calculate that the direct effects of tourism on other industries is about 25 percent of Tourism GDP – or \$5.5 billion – and that the indirect impact of tourism is more than 39 percent of Tourism GDP, or approximately \$14.3 billion in additional value added from tourism in the Canadian economy.

This, then, is why we line up business alliances with companies such as Michelin, Rover, American Express, Samsonite, Canada Post, Caldo Coffee in Italy and restaurant chains in France. It is becoming much more widely known that the rising tide of tourism lifts a lot of boats.

Last year, it is estimated that 563,500 people were employed as a direct result of tourism activity. The indirect employment, of course, includes a lot more people than that. With good luck and hard work, we will soon see a flowering of our efforts, and begin to reach an even greater number of people, to increase our reach and presence in Canada and abroad. 🍁

The consumer studies are available at www.canadatourism.com, via the research links. For more information: meis.scott@ctc-cct.ca.

Winter travel steady

Canadians are making winter holiday plans at the same rate as last year, but U.S. residents have scaled down their winter and spring travel intentions, according to vacation intention surveys held annually in Canada and the U.S. and released in early January. The surveys were done without reference to a possible military conflict in the middle east.

According to the surveys, 42 percent of respondents in Canada said they are planning a winter getaway, unchanged from one year earlier. In the past decade winter vacations have varied in popularity among Canadians, from a low of 35 percent recorded in 1998 and 2000 to 62 percent in 1992, the high point for the decade. Of Canadian residents planning a winter holiday, 47.4 percent

intend to stay in Canada, down from 48.3 percent a year earlier. Slightly more, 50.9 percent, plan to travel to another country, up from 47.7 percent a year earlier. Among destinations for Canadians, Mexico, the Caribbean and Europe are rising in popularity from a year earlier, while the U.S. is down slightly. Significantly, the number of those undecided about taking trips has fallen in the past year, from 4.0 percent recorded in September 2001 to 1.7 percent in September 2002, which may indicate that the fear surrounding travel plans brought about by the events of September 11 is dissipating in Canada.

In the U.S., only 35.1 percent of U.S. residents said they would take a vacation trip during the first six months of 2003, the lowest figure in more than a decade. Of

those who plan to travel, slightly more are heading outside the U.S. – 21.9 percent intend to travel to a foreign country, up from 19.1 percent a year earlier. The Canadian Tourism Commission (CTC) forecasts a slow-but-sure recovery for the U.S. tourism market.

The surveys were conducted before the threat of a war in the middle east became imminent. The *Winter Vacation Intentions Survey* is conducted in September of each year and published in Canada by the Conference Board of Canada. The *U.S. Winter Vacation Intentions Survey* is conducted in December of each year and published in the U.S. by the U.S. Department of Commerce. 🍁

For more information: meis.scott@ctc-cct.ca

CTX Alive

The Canadian Tourism Commission (CTC) is set to update its corporate Web site, including the Canadian Tourism Exchange (CTX).

The goal is to enhance technology and content so that users may be provided with an environment that is easy to understand and navigate, and that fulfils their information requirements.

The CTC is currently in a "requirements gathering" stage and is targeting the end of February 2003 for the release of a Request for Proposals to the Internet technology industry.

Share your ideas/comments with Isabelle Des Chênes, director of communications, at (613) 946-2122 or deschenes.isabelle@ctc-cct.ca 🍁

2002 performance mixed

All the numbers are not in yet, but there is a mixed review for tourism performance in 2002. While the overall statistics for 2002 are still being calculated, preliminary figures from North America between January and November 2002 show an industry involved in a sluggish recovery from the twin factors of the effects of the terrorist attacks on September 11, 2001 and the worldwide economic slowdown of the same year. Except where indicated, figures are adjusted for seasonality and inflation. A few highlights:

Canadian outbound travel

Canadian travel to international destinations continued a downward trend, falling to 16.5 million overnight outbound trips from January to November 2002, 4.9 percent less than the same period in 2001.

Domestic tourism demand

Domestic tourism demand dipped in the third quarter of 2002, as Canadians travelling within Canada spent \$7.8 billion, a decline of 1.8 percent. However, compared to one year ago, third quarter domestic spending increased 4.1 percent to \$10.9 billion.

International tourism demand

Foreign visitor spending increased in the third quarter by 0.9 percent over the second quarter, to \$3.9 billion. However, compared to the same period a year earlier, spending by foreigners declined 2.8 percent to \$7.1 billion (not adjusted for seasonality nor inflation).

U.S. travel to Canada

U.S. travel to Canada grew between January and November 2002, up 3.7 percent from a year earlier, to 15.2 million overnight trips. Gains in auto travel outpaced declines in arrivals by air. Canada was the only country to witness a rise in U.S. visitors between January and July 2002, as Europe saw a 19 percent decline in American overnight trips compared to 2001.

Consumer confidence

The consumer confidence index, published by the Conference Board of Canada and often used as a barometer for future tourism spending, rose in Canada in November 2002, to 119.1, up from 117.8 in October (base year 1985 = 100). The consumer confidence index fell again in the U.S. in December 2002, to 80.3.

Uneven benefits across Canada from rubber tire

Eastern and central Canada are witnessing the most gains in U.S. auto traffic, with gains of 7.0 and 14.7 percent, in Atlantic Canada and Quebec respectively, over the first eleven months of 2002, compared to the same period in 2001. The western provinces are seeing less of the rubber tire market increase. Alberta posted only a 1.6 percent gain and B.C. logged in a modest 3.5 percent rise. 🍁

For a more complete reading of the Canadian and U.S. travel research statistics, visit www.canadatourism.com

A MONTHLY GUIDE TO TRAVEL AND TOURISM DATA

TOURISM ACTIVITY	REFERENCE PERIOD	QUANTITY	% CHANGE FROM PREVIOUS YEAR
TOURISTS TO CANADA			
From the U.S.	January – Nov. 2002	15,231,871	3.7
By Auto	January – Nov. 2002	10,013,860	7.5
By Non-auto	January – Nov. 2002	5,218,011	-2.9
From Overseas - Total	January – Nov. 2002	3,635,185	-6.1
United Kingdom	January – Nov. 2002	696,072	-12.6
Japan	January – Nov. 2002	413,895	3.7
France	January – Nov. 2002	295,583	-13.8
Germany	January – Nov. 2002	282,473	-13.8
Hong Kong	January – Nov. 2002	111,079	-6.4
Australia	January – Nov. 2002	141,066	-7.0
Taiwan	January – Nov. 2002	100,357	-10.0
Mexico	January – Nov. 2002	149,120	6.2
Korea (South)	January – Nov. 2002	141,489	5.8
OUTBOUND CANADIAN TOURISTS			
To the U.S.	January – Nov. 2002	12,139,200	-5.1
By Auto	January – Nov. 2002	7,238,864	0.6
By Non-Auto	January – Nov. 2002	4,900,336	-12.4
To Overseas - Total	January – Nov. 2002	4,330,100	-4.4
EMPLOYMENT IN TOURISM			
Total Activities	Third Quarter, 2002	604,100	0.5
Accommodation	Third Quarter, 2002	145,300	-0.3
Food and Beverage	Third Quarter, 2002	144,900	2.0
Transportation	Third Quarter, 2002	79,600	-3.4
SELECTED ECONOMIC INDICATORS			
Personal Disposable Income per person (\$)	Third Quarter, 2002	22,296	0.7
GDP at market prices (current, \$ billion)	Third Quarter, 2002	1,151.8	1.2
GDP chained (1997, \$ billion)	Third Quarter, 2002	1,066.6	0.8
CPI (1992=100)	December 2002	120.4	3.9
EXCHANGE RATES (IN CDN\$)			
American dollar	December 2002	1.5593	-1.2
British pound	December 2002	2.4730	8.8
Japanese yen	December 2002	0.0128	3.2
EURO	December 2002	1.5883	12.9

Note: All tourist estimates deal with trips of one or more nights; All data on this table is not seasonally adjusted.

Sources: Statistics Canada and the Bank of Canada.

CTC develops impact scenarios in case of a conflict in the Middle East

As winter progresses, the possibility of a conflict in the Middle East continues to grow. Whether such a conflict is long or short, contained or expanded, the effect on tourism will be negative. The greater the scope, the greater the effect, and the Canadian Tourism Commission (CTC) is taking measures similar to those taken following September 11 to assess and deal with the potential impacts.

A private/public sector task force has been formed and a study has been completed which is available through the CTC Web site.

Additional research will be conducted as necessary; the CTC sales force is currently being polled for potential impacts in their specific markets.

spending, consumer and business confidence, and air travel supply as well as the effect of any real or perceived widespread reprisals.

Mexico, Hong Kong, and Australia. Markets most affected would be U.S. (air), U.K., Japan, South Korea and Taiwan. The major trend of travellers staying close to home will persist and expand; airlines will face a most difficult time balancing low fares to attract customers, with rising cost of operations. 🍁

Information on conflict impacts is continually being updated and is available at www.canadatourism.com. For more information: penney.tom@ctc-cct.ca.

The big "if" is how a war might affect the confidence of businesses and consumers, causing them to pull back on spending – and they're a major engine of the economy.

Marc Levesque, senior economist at TD Bank, quoted by Gillian Livingston in The Halifax Herald.

Key variables in any Middle East conflict include the price of oil, the health of equity markets, military

Current predictions indicate that the markets least affected by a conflict would be Canada, U.S. (rubber tire),



Tourism Roundup

Appearing among the "top 99" in a recent poll of *Condé Nast Traveler* magazine's readers were Vancouver Island's **Aerie Resort** (34th) and Vancouver's **Wedgewood Hotel** (47th). Participants in the magazine's 15th annual poll, published in its November edition, picked **Québec City**, **Vancouver**, and **Victoria** among the top 10 non-American cities. **Vancouver Island** was picked the top temperate island in the world, edging out Madeira and Capri. In this same category, **Prince Edward Island** was ranked eighth and **Cape Breton** 10th.

Big White Ski Resort Ltd. and Legend Resorts Ltd. at **Kelowna, B.C.** have announced a \$35 million dollar residential development. The new **Sundance Resort** will feature ninety-three luxury residences and amenities that will include a waterpark with waterslide, heated pool, spa, theatre, fitness facilities, a library, a children's play area and easy access to the slopes.

Associated Press reports that U.S. travel executives are concerned that the tourism industry in that country is threatened by the growing perception overseas that the U.S. has become "**Fortress America**." After the September 11 attacks, 66 million fewer visitors tried to enter the U.S., according to Immigration and Naturalization Service figures, and those who did try were sent back home at a higher rate than the year before.

Starting in January, Canada's presence in the **Brazilian travel market** will be provided by **Pressto Comunicações**. The local PR firm was selected after a thorough competitive selection process conducted in collaboration with the industry. Ms. Maria Alice Ancona Lopez (Mariuccia) and her team will work closely with the Canadian Tourism Commission (CTC) and the tourism industry in Canada and Brazil to increase

awareness of Canada. The CTC Brazil offices were closed in December 2002.

A tourism partnership called **Signature Attractions of Atlantic Canada** has been created to enhance and promote cultural attractions in Atlantic Canada to key consumer markets. Atlantic Canada Opportunities Agency (ACOA) will contribute \$480,000

of **fragmented and inconsistent resources** dedicated to tourism and have agreed to develop elements of a tourism strategy to maximize resources for the growth and development of the tourism industry in Canada "while recognizing the unique nature and characteristics of the provinces and territories and respecting their priorities and jurisdictions."

According to a survey of **National Tour Association** members, they are observing an increase in travel closer to home and shorter trip times. The survey indicates that 72 percent of tour operator members say travellers are staying closer to home and 64 percent say vacationers ventured on shorter trips this year. Thirty-four percent of tour operator members are witnessing an increase in business to business partnering with other operators and members. "We're witnessing a new reality in the travel and tourism industry," said 2003 NTA Chairman Charlie McIlvain, president of Idle Time Tours of Dallas/Fort Worth. For more information, visit www.ntaonline.com



The Canadian Museum of Civilization opened The First Peoples Hall in January. It is the largest permanent exhibition on Canada's Aboriginal peoples, highlighting their cultural, historical and artistic achievements, both past and present.

over two years to Signature Attractions, a consortium of the four Atlantic provinces.

In November of 2002, the Oprah Winfrey Show featured, as incredible survivors, the Philadelphia miners that were trapped underground for three days. Among other gifts, the miners were given a fishing trip to **Knee Lake Resort** in Manitoba.

At a federal, provincial, and territorial meeting in Victoria, in December, tourism ministers agreed that quick action is necessary to increase Canada's competitiveness in the global tourism industry. They also discussed the challenge

Culinary Team Canada has picked up some top trophies at the Expogast Culinary World Cup competition in **Luxembourg**. The 11-member team won gold in the "hot kitchen" and silver in the "cold competition". Lesia Burlak of the Hilton Hotel Toronto won the Culinary World Cup in individual cuisine, and Patrick McMurray of Starfish Oyster Bed & Grill won the World Oyster Opening Championships.

The federal government has cut off funds to **Attractions Canada**. Public Works Minister Ralph Goodale says the Canadian Tourism Commission already promotes tourism.

The federal government has contributed over \$200 million to the **Vancouver Convention and Exhibition Centre** through the *Canada Strategic Infrastructure Fund*. The provincial government has matched the federal contribution and \$90 million has been gathered from the tourism industry.

A Japanese-language magazine has named **St. Catharines** in the Niagara region of southern Ontario as the tourism destination of the year in its December issue. "There's very little multiculturalism in St. Catharines, and you can still experience traditional Canadian culture," said Taka Aoki, editor and publisher of the *Canada Japan Journal*. "They still have rolling hills and people who play hockey."

The **Sport Events Congress 2003: Building Business through Sport** is scheduled for April 3-5, 2003 at The Westin Ottawa. Sport Events Congress is Canada's largest annual gathering of sport events rights holders, convention and visitors bureaus and other sport and tourism professionals. This event sold out in 2002... for information visit www.canadiansporttourism.com



George Chyzyj has joined the CTC as a contracting officer. He has extensive experience in the field of materials management, most recently as a senior buyer with Pratt & Whitney Canada.

Patricia Urquhart has joined the CTC's administration office. Until recently, Urquhart was facilities manager and coordinator of materials management for Eftia OSS Solutions of Ottawa.

Jorge Morfin Stoopan has joined the CTC's Mexico office as director. Stoopan has most recently been working as marketing director at Invex Grupo Financiero, S.A. de C.V. in Mexico City. New CTC address in Mexico: Canadian Tourism Commission "Torre del Angel" Pasea de la Reforma 350-9o Piso Col. Juárez 06600 Mexico D.F. Phone: (52-55) 5514-4849 Fax: (52-55) 5514-1142

Michael Mulhall has been re-appointed to Ontario Tourism Marketing Partnership board of directors and has been elected chair of the Ontario Tourism Education Corporation. Mulhall is president of Ottawa Riverboat Company and CEO of eKiosk Inc.

Antonella Pontello has joined the CTC to manage the Human Resource Service's administration. She has worked as administrative assistant for the past six years in the high-tech sector with Intelligent Detection Systems and Autodesk.

Heidi Rust is the new general manager of Long Beach Resort (Vancouver Island), and is joined by new executive chef Stephen Frost. Rust recently managed the Durlacher Hof, a five star B&B based in Whistler. Frost has trained under Vancouver chef James Walt at both the Blue Water Café in Vancouver and Araxis Restaurant in Whistler.

Bruce MacMillan has been appointed president and CEO of Tourism Toronto. He comes to Tourism Toronto from his previous position as vice-president of Meeting Professionals International (MPI); past experience includes more than 10 years as vice-president of

sales and market development with the Greater Vancouver Convention and Visitors Bureau.

Christa-Lee Bond has been elected president of the board of directors of the Okanagan Wine Festivals Society.

Chantal Bédard-Paquette has joined the CTC as an administrative assistant for finance and administration. She has until recently been assistant to the national director of the Liberal Party of Canada.

Julie Schnubb has joined the CTC in the accounts payable group. She is currently studying for an accounting degree has experienced a full accounting cycle with Ottawa area companies.

Gordon MacInnis has been elected president of the Tourism Industry Association of P.E.I.

Sylvie Nadeau has been appointed chair of the Cultural and Heritage Tourism Sub-committee of the CTC. Nadeau is owner of SN Tourisme culturel, a Quebec-based tour operator specializing in cultural tourism and learning travel, especially in the field of performing arts.

CTC research committee chair **Marc Rosenberg** has announced research sub-committee appointments as follows: **Raymond Chan** (chair, communications sub-committee), **Greg Danchuk** (chair, core surveys sub-committee) and **Jim Berwick** (chair, economics sub-committee).

The Hon. Elaine Elizabeth Taylor has been sworn in as Minister responsible for Business, Tourism and Culture for the Government of Yukon. She also carries the portfolio of Minister of Justice in the new government.

Gary Clarke has been elected president of the Tourism Federation of Ontario. Clarke owns Sam Jakes Inn at Merrickville and is president of Destination Ontario Inc.

Jim Peterson has been chosen as president of the NWT Arctic Tourism Board. He operates Peterson Point Lake Lodge north of Yellowknife.

Chantal Désilets has been appointed director of sales at Hawthorn Hotel & Suites in Calgary. Her most recent previous appointment was with the G8 Summit Management Office (Department of Foreign Affairs and International Trade) where she managed the Conference Services Branch.

Will McClelland has joined the CTC communications team to work as a writer for TOURISM magazine. He has a BA with Honours from McGill, and has worked as a reporter, columnist and copy editor with *The Low*

down to Hull and back News, in Wakefield, Quebec.

Raymond Carrière (chairman, Communities in Bloom, Quebec) and **Cindy Creamer-Rouse** (director, product development, New Brunswick Tourism and Parks) have been appointed to the Product Development committee of the CTC. Carrière has been named committee vice-chair.

Ted Hoszko has joined the CTC's finance team in the position of distribution centre coordinator. ✶



Bob McLeod

Tourism Profile

To keep our readers informed about key decision-makers in Canada's tourism industry, *TOURISM* is introducing members of the Canadian Tourism Commission (CTC) board of directors and committees. Each profile highlights the personal vision of these industry leaders as they voice their opinions on important issues facing the tourism sector.



Bob McLeod is the public sector representative for Alberta, Northwest Territories (NWT) and Nunavut on the Canadian Tourism Commission Board of Directors. McLeod was appointed Deputy Minister of Resources, Wildlife and Economic Development in October 1999, which is responsible for tourism in the NWT.

He has served as Deputy Minister of Municipal and Community Affairs and Assistant Deputy Minister of Resources, Wildlife and Economic Development. In the 1980s, McLeod held several senior management positions with the Northern Affairs program of Indian and Northern Affairs Canada.

McLeod has played a key role in the development of Aboriginal and NWT tourism. He has increased awareness and supported the development of this industry and supported various operators. Through his travels he has become an ambassador for the NWT, and successfully promoted the Northwest Territories as a four season travel destination. McLeod is Metis, born and raised in Fort Providence, NWT; he and his wife Melody have one son, Warren.

McLeod feels that Canada should build on her reputation for safety and hospitality, and the fact that we offer a diversity of experience that includes the fast-paced excitement of our major cities as well as our multicultural rural landscapes and unique northern communities. "I expect that the CTC will increase its efforts to market Canada in partnership with the provinces and territories," says McLeod. "The number one priority for the CTC in 2003 will be to maximize the return on investment of all CTC programs and obtain additional financial resources to help us meet this goal." ✶

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2003

Opportunities to buy into the campaigns are still available. Contact the program directors.

2004

Find out what's in store by taking in the annual Road Show at the end of April. Look for more details in the March issue of TOURISM.

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